Getting Started with Views

Views System Manual

substance.

Version 2.0

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1. Introduction

Views is a new, flexible online platform designed by Substance to help public sector and community and voluntary sector organisations to demonstrate the value and outcomes of their work.

Security

Data stored in Views is looked after to the highest standards. Information is held securely within the system and accessed via a password protected URL address. Data is stored in a secure data hosting facility in the UK and is backed up 'off site' twice a day. This method of storage means that projects do not need to be concerned with in-house data storage and can be confident in the security of their data.

The system is divided into four key sections:

Contacts – Record bespoke demographic, progression and case history information about the people and organisations you work with.

Work – Record details about the projects and programmes run by your organization.

Evidence – Upload media files, case studies and questionnaire forms to evidence participant progress.

Reports – Access real-time reporting tools including statistical data queries and fully flexible report templates.

2. Logging on to the System

To get started you need to open your computer's Internet browser and then enter the following URL address:

https://app.views.coop

You may find it useful to bookmark this address in your browser.

All staff members for whom a login has been created by the 'administrator' associated with your account can access their Views accounts via this screen.

To access your Views account you need a **Username** and **Password**. If you have not received these from Substance, please ask your project administrator to set them up for you. If you do not know who your administrator is, please contact Substance via the contact details given at the end of this manual.

If you do have a username and password, enter them into the relevant fields and click on the **Login** button.

3. Adding Contact Records

The Contacts section is split into four different areas:

- **Participants** – For storing records of the people that you work with.
- **Groups** – For storing records for groups of contacts (e.g. Families, School Classes, Focus Groups) or for recording details of organisations.
- **Staff –** For storing records of the people that work within your organisation.
- **Volunteers –** For storing records of the people that volunteer on your projects.

To add a new **Participant**:[1]

1. From the home screen hover over **Contacts** and click on **Participants**.

2. Click on **Add Participant.** This will direct you to the blank Participant record screen.

3. From here you can enter the relevant details for the Participant. Some fields have *required* written in red next to them. These fields are *compulsory* and the record cannot be saved until they have been filled in.[2]

4. Once you have filled in the relevant sections of the form, click on **Add** at the bottom of the screen, you will be shown a **Summary** of the person's details.

Within this summary page you will notice that you have access to a series of tools along the left hand side of the screen. These tools will allow you to store additional information about the participant and their development. In brief, these are:

- **Details –** Access an overview of the participant's details;
- **Notes –** Create and edit notes for the participant;
- **Engagement** - View the participant's Engagement Levels (see page 8);
- **Outcomes –** Set outcomes and achievements;
- **Qualifications –** Record qualifications;
- **Conditions –** Record relevant health conditions, such as allergies or disabilities;
- **Restrictions –** Record any restrictions to the person's attendance or participation.
- **Session Attendance –** View a breakdown of the participant's attendance at sessions and schedule new 121 sessions;
- **Questionnaires** – Create and respond to questionnaires on the system;
- **Group Membership** – Attach the participant to a Group (see page 5);
- **Volunteering History** – View a breakdown of their volunteering history;
- **Media** – View all media files that have been linked to the participant;
- **Address Book –** Create and edit the participant's key contact information;
- **Map** – Pinpoint the participant's address on an interactive map.

[1] In this example we will look at how to add a new **Participant**. However, this same process can also be used for adding **Staff** and **Volunteer** records.
[2] Required fields are set by the project or programme administrator. For more information on how fields can be edited please see the Administration section of this manual.

4. Adding 'Group' Contact Records

In Views you can create contact records for **Groups** that you work with. For example, a group might be an external partner or a local community group. A Group can be a standalone record or it can be a group of 'People' records that already exist on the system, for example a number of participants that all belong to the same family or school class. By grouping records together you are able to run statistical reports based on the activities and achievements of all the members of a selected group rather than having to report on an individual basis.

To create a new **Group**:

1. From the home screen hover over **Contacts** and click on **Groups**.

2. Click on **Add Group.** This will direct you to the blank Group record screen.

3. From here you can enter the relevant details for the Group. Some fields have *required* written in red next to them. These fields are compulsory and the record cannot be saved until they have been filled in.

4. Once you have filled in the relevant sections of the form, click **Add** at the bottom of the screen.

5. After you have saved the Group you will be shown a **summary** of their details.

6. To add Participant, Staff or Volunteer records to this group click on the **Members** button to the left of the screen.

7. From here you can search for the relevant record. Click on their name and click **Add** to add them to this Group.

5. Creating Session Groups and Sessions

Sessions and strands of work are organised into **Session Groups.** A **Session Group** is any group of regular, linked sessions. For example, a project that runs a football session every Friday night might create a **Session Group** called 'Friday Night Football'. Each individual Friday night session register can then be attached to this Session Group.

To create a new **Session Group**:

1. From the home screen hover over **Work** and click on **Session Groups**.

2. Click on **Add Session Group.** This will direct you to the blank **Session Group Profile** screen.

3. From this page you can enter the relevant details about the Session Group.

4. Once you have filled in the relevant sections of the form, click **Add** at the bottom of the screen.

5. You will then be directed to a **Delivery Profile** screen. From this page you can enter in the relevant details about the delivery of the session group such as Planned Number of Sessions and Start and End dates.

6. After you have saved the Session Group you will be shown a **Summary** of the details you have entered. You are now able to attach sessions to this group.

To create new sessions:

1. Select **Sessions** from the tab on the left of the screen, and click the **Add Session** button.

2. Here you can specify the relevant details of the session such as the Date, Time and Activity.

3. To create multiple sessions, set the **Repetition** as **Weekly** or **Monthly** as required.

4. You can also select the **Venue** for the session. The list of Venues is generated from those created in the Venue section (see page 9).

5. Once you have filled in the relevant details click **Add** at the bottom of the screen. If you have selected **Repetition** as **Weekly** or **Monthly** you will be directed to the **Recurrence** screen where you can create multiple sessions, otherwise you will be directed to the Session Group Summary screen.

6. Registering Participants to Sessions

Once you have created your sessions it's time to start registering participants and completing session registers. This will allow you to run statistical reports based on **attendance.**

N.B. In order to attach a person to a session register they already need to be added as a record on the system (see Page 4).

To **register a Participant** on a Session:

1. Click on **Registered People** from the tab on the left-hand side of the screen.

2. Enter the name of the person and click **Search.**

3. Select their name and click **Add.**

4. Repeat until you have added all the records that you want to create a session register for.

5. Go to **Sessions** from the tab on the left hand side of the screen and click on the relevant session.

5. Click on **Import Registered People.** This will create a register of the people you have just added in the **Registered People** section.

6. Tick the people who attended the session and click **Save.**

7. Recording Engagement Levels

The Engagement Level tool provides users with a means to measure a Participant's development in the context of their contact with the project, whether it is positive or negative, in a quantitative way. The *Substance Engagement Matrix* (Appendix 1) highlights the categories and sub-categories of engagement, which range from disengagement through to autonomy.[3]

Engagement levels can be recorded for participants for any Session Group in which they are involved as it is acknowledged that a participant may behave differently in certain settings and environments.

To set an **Engagement Level** for a Participant:

1. Go to **Session Groups** from the **Work** section and select the relevant session group.

2. Click on **Sessions** from the tab on the left-hand side of the screen and select the relevant session.

3. Find the person that you want to set an engagement level for.

4. On the right-hand side of the screen under **Actions**, select the **E** button next to the relevant participants name.

5. Enter the **date** that you are setting the level, the l**evel** that you are setting for the participant and a **justification** as to why you are setting that level.

6. Click **Submit**.

To **view** a Participant's Engagement record:

1. Go to **Participants** from the **Contacts** section and select the relevant participant.

2. Go to **Engagement** from the tab on the left-hand side of the screen.

[3] Projects are advised to record these engagement levels at periodic intervals. Ideally, the interval should be no more frequent than monthly and no less frequent than quarterly as participants can alter their behaviour greatly over short periods of time and therefore frequent recording would only highlight this inconsistency rather than monitor any real long-term changes.

Projects may choose to make group decisions on engagement levels or allow the delivery staff to make individual judgments. Whatever method is chosen it is important that these levels are used in a developmental fashion. Over a period of time projects can look at participants related to particular session groups, locations or delivery staff. Any changes in engagement alongside the justifications may lead to the project altering that participant's programme of work or certain delivery aspects of a session. Ultimately these engagement levels should be seen as a resource for reflecting upon the usefulness of a programme in terms of participants' 'distance traveled'.

8. Creating Agency Projects

Agency Projects allow users to arrange **Session Groups** into categories or 'folders'. This is useful for running statistical reports for multiple session groups rather than on an individual basis. For example, you may want to categorise your Session Groups by geographical location or by a particular funding stream.

N.B. A session group can be attached to as many different Agency Projects as required.

To create a new **Agency Project**:

1. Select **Agency Projects** from the **Work** section.

2. Click on **Add Agency Project** and enter the name and description.

3. Select the Session Groups that you want to join this Agency Project and click **Add**.

4. From the tabs on the left-hand side of the screen you are also able to link this Agency Project to Objectives and Outcomes as defined by the project or programme administrator.

9. Creating Venues

By creating Venues on Views you can then attach sessions to specific locations. This will allow you to run statistical reports based on geographical data.

To create a new **Venue**:

1. Select **Venues** from the **Work** section.

2. Click on **Add Venue.**

3. Enter the relevant address and contact information and click **Add.**

4. From the **Map** tab on the left-hand side of the screen you are also able to view an interactive map of the Venue location.

9. Uploading Media Files

A key element of the Views system is the ability to evidence your work through the uploading of media files. These may be multimedia items such as photographs, videos and audio files or other evidence such as web links or documents. These files can then be tagged against sessions, participants or outcomes to support the work that has been recorded on the system.

If you already have multimedia files stored on YouTube, Flickr or Ipadio the system can link to these directly.

To upload a **Media File** that is stored on your computer:

1. Select **Media** from the **Evidence** section and then click on **Add** media.

2. Select the type of media that you wish to upload e.g. an image or audio file.

3. Click **Choose File** and select the file from your computer.

4. Click **Upload.**

To upload a Media File that is **stored online**:

1. Select **Media** from the **Evidence** section and then click on **Add** media.

2. Select either Flickr, Ipadio or YouTube depending on where the file is stored online.

3. Enter the web address for where the file is located.

The file will be uploaded directly onto the system from the external site.

After you have uploaded a file to Views you may then choose to **associate** it with the relevant people or work that it is linked to. This will make it easier for you to find the file in the future.

To create **associations** for a file:

1. Select **Media** from the **Evidence** section

2. Click on the relevant file and select **Associations** from the tab on the left.

3. Click on **Manage Associations**.

4. Select the **Association Type** that you would like to create (e.g. a link to a person or to a particular piece of work) and click **Add.**

5. Finally, choose the associations you want to make (e.g. select the relevant people or the relevant pieces of work) and click **Commit.**

10. Creating Case Studies

The case study tools acts as an online multi-media word processor. It allows you to pull together various pieces of information on the system such as media files and statistics alongside text to create interesting stories and mini-reports that evidence your work in a qualitative way.

To create a new **Case Study**:

1. Select **Case Studies** from the **Evidence** section.

2. Click on **Add** Case Study.

3. Enter the relevant information about the case study such as the title and description. From this page you can also link the case study to any relevant session groups that are stored on the system. This will make it easier to find the information that you are looking for later.

4. Click **Add.**

5. You will be directed to a word processing screen. From this page you have a range of formatting options to put together the case study that you need. When you are finished, click **Save** at the top-right of the screen.

11. Administration

The Administration section contains a library of tools that will allow you to edit the general set up of your Views account. You will need to be logged in as an administrative user to access these tools. Administrative users can access this section by hovering over **My Account** and selecting **Administration.** You will notice a series of tabs listed on the left hand side of the screen:

Flexible Fields

The Flexible Fields section allows you to edit a number of the forms and fields that your Views account uses to collect information.

After clicking on the Flexible Fields tab, select the form that you would like to edit. This will bring up a list of the fields that currently make up that form.

- To edit an existing field select the Pencil icon directly to the right of the relevant field in the **Actions** column.

- To disable or enable an existing field select the Cross or Arrow icon (depending on whether the field is currently enabled or not) from the far right of the screen in the **Actions** column.

To add a new field to a form:

1. Select the **Add a Field** button at the top of the list of fields.
2. Enter the field **Name**, select an **Input Type** and a **Category** and click **Save.** (For an explanation of these various terms please see the *Glossary*).
3. You then have the option of making the field **Compulsory**. If you select compulsory the form will not be able to be saved by a system user until this field is completed.
4. Finally, if you have selected an **Input Type** that requires specified options (e.g. Checkboxes) you will be asked to select the **Value List**. You can choose a current **Value List** from the menu or you can click **Add** to create a new one.

Value Lists

A **Value List** is the series of options that a user can choose from when entering information into a field. For example, if the field is **Ethnicity** then the **Value List** is the choice of different Ethnicities that the User can select from. This tool allows you to View and Edit all of the Value Lists that you are currently using within your account.

Registration Forms

This section allows you to add Fields to printable Session Registers. For each Register type you can select up to **ten** fields to be included.

Search Fields

Specify the fields that users are able to apply in searching your Views database.

Objectives and Outcomes

Objectives and Outcomes are organised into four tiers:

Programme Objectives - Show the Programmes associated with this Agency, their Objectives, and which National Frameworks, and Outcomes they feed into.
Agency Objectives - Overall Objectives of the agency, these can be linked to National Frameworks.
Agency Outcomes - The Outcomes that the Work on the ground will achieve, these can be linked to Agency Objectives
Outcomes - The set of Outcome which may be selected in the system, these can be linked to one or many Outcomes at Agency level, or at any Programme's Level.

Security

The Security section allows you to create new user logins and to define different levels of access to your Views account.

To add a new user

Select **Users** from the Security menu and then click **Add**. From here you can set a Username and Password for the person and also specify what User Group they fall into. To save the form, select **Submit.**

To add a new User Group

Select **User Group** from the Security menu and then click **Add.** You are then able to specify the sections of the system that a user in this group would have access to by toggling the On / Off switches in the **Permission** Column.

Qualifications, Conditions & Restrictions

These tools allow you to edit the specific Value Lists that the system uses to collect the information in these sections of the system.

12. Glossary

Agency Project – A folder that links relevant Session Groups together for reporting purposes. For example, an Agency Project might contain all the Session Groups that share the same funding stream or geographic location.

Category – A section of a form.

Dropdown: Single Selection – An input type that allows users to select one option from a pre-defined list.

Dropdown: Multiple Selection – An input type that allows users to select a number of options from a pre-defined list.

Engagement Level – A level periodically set for a person to monitor their engagement with a project. For an explanation of the various levels see Appendix 1.

Input Type – The type of input that a field currently requires – for example a drop down menu or a checkbox.

Session Group – A group of regularly linked sessions or events.

Value List – The series of options that a user can choose from when entering information into a field. For example, if the field is **Ethnicity** then the **Value List** is the choice of different Ethnicities that the user can select from.

13. Contact Details

If you have any queries about the system or would like to arrange a training session for your staff you can contact Substance using the details below:

Substance
3rd Floor
Fourways House
57 Hilton Street
Manchester
M1 2EJ

E-mail: info@substance.coop
Website: www.substance.coop
Telephone: 0161 244 5418

You can also access a series of online tutorials from the support pages of the Views website at http://views.coop/support.

14. Appendix 1

The Substance Engagement Matrix

Level 1 Disengagement	Level 2 Curiosity	Level 3 Involvement	Level 4 Achievement	Level 5 Autonomy
Sit out and ignore activity	Watch activity	Join in with others	Complete tasks	Initiate ideas
Encourage disputes	Dip in and out	Respond to instruction	Communicate with staff outside of activity	Help plan and run activities
Distract others	Ask questions	Talk about experiences	Make positive comments about work	Advise and educate peers
Walk out	Listen to staff and peers	Enjoy good relationships	Celebrate work publicly	Praise work of others
Make negative comments	Comment on activity	Share facilities	Make connections beyond the project	Deal with conflict
Destroy/damage facilities	Talk to others about activity	Handle conflict with maturity	Receive accreditation and gain qualifications	Volunteer
	Try on own	Attend regularly		Make ‘career’ choices
				Employment
Other				